



PAPERPORT 14

Getting Started Guide

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END-USER LICENSE AGREEMENT

Please see this text via the About PaperPort panel, accessible from the Help ribbon.

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Welcome to PaperPort

Welcome to the Nuance® PaperPort® *Getting Started Guide*. It is supplied as a PDF file, suitable for use with screen readers. If you print it to paper, we recommend double-sided printing with two pages per sheet.

PaperPort provides the easiest way to turn paper into organized digital documents that everybody in an office can quickly find and use. PaperPort works with scanners, multifunction printers, and networked digital copiers to turn paper documents into digital documents. It then helps you to manage them along with all other electronic documents in one convenient and easy-to-use filing system.

PaperPort's large, clear item thumbnails allow you to visually organize, retrieve and use your scanned documents, including Word files, spreadsheets, PDF files and even digital photos. PaperPort's Scanner Enhancement Technology (SET™) tools ensure that scanned documents will look great while the annotation tools let you add notes and highlights to any scanned image.

Accompanying programs

PaperPort 14 includes a PaperPort Image Printer, a ScanDirect™ application, (described later), a Scanner Setup Wizard, an ImageViewer application (for viewing and working with page images in a window separate from PaperPort) and PDF Viewer Plus (for viewing and working with PDF files).

Added components are the Nuance Cloud Connector for accessing other cloud sites and a MAX file to PDF Converter.

In PaperPort Professional, the PDF Viewer Plus includes Nuance PDF Create, providing high-level support for PDF creation from a wide variety of source files.



Installing PaperPort

You can install PaperPort from a CD, a DVD, or from the web. The installation program provides easy step-by-step instructions. Follow the guidance on each screen to install the software. Installation and un-installation require Administrator rights. PaperPort installation comprises five elements that are installed in a single process:

- PaperPort program (includes ImageViewer, ScanDirect, MAX to PDF Converter, an Evernote® connector and the Scanning Wizard)
- Nuance PDF Viewer Plus (in PaperPort Professional this includes Nuance PDF Create)
- PaperPort Image Printer
- Nuance Cloud Connector (optional install)

PDF Viewer Plus is not installed if the top-line Nuance product PDF Converter Professional® is detected on the computer (version 6 or above) because it provides all the functionality of PDF Viewer Plus, and much more additionally.

The latest PDF Viewer Plus cannot co-exist with Nuance PDF Converter Professional 5 or below, you must choose which program to keep. To use an old PDF Converter Professional with PaperPort, it must be the application associated to PDF files in your Windows® system, and PaperPort must be set to open PDF files with that associated program (see page 52).

To install PaperPort and its key components:

1. Click **Autorun**.
2. Select an installation language and click **Start installation**.
3. Accept or change the program folder location, fill out Customer Information and click **Next**. Read and accept the terms in the license agreement.
4. Autorun then starts the InstallShield Wizard. It offers a Complete or a Custom installation. Choose **Custom** only if you want to add your own folders to the supplied PaperPort folders during installation. You can add folders later (see page 28).

If PDF Viewer Plus/Create is to be installed, the following checkmarks appear:

Set Nuance PDF as your default viewer for Windows and Internet Explorer

This sets PDF Viewer Plus as your system default PDF viewer. PDF files on the PaperPort desktop are by default opened in a Nuance PDF product. If you select this option, PDF files that are double-clicked anywhere on your system will open in PDF Viewer Plus.

Install all Nuance PDF button and menu application add-ins

This choice appears only in PaperPort Professional. It places a Nuance PDF ribbon or toolbar in Microsoft® Word, Excel®, PowerPoint®, Outlook®, Internet Explorer®, Windows® Explorer and Corel® WordPerfect™, allowing PDF Create to make PDF files from the current document or mail attachment or web page. In Windows XP, go to **Control Panel**, then **Add or Remove Programs** to later enable or disable these add-ins individually (in Windows Vista, Windows 7 and Windows 8, go to **Control Panel**, then **Programs and Features**).

Install the Nuance Cloud Connector

This optional application provides convenient file transfer to and from the most popular web-based storage sites. By default it is not installed.



Activating PaperPort

Most versions of PaperPort 14 require activation. For activation and deactivation you need web access. You will be invited to activate the product at the end of installation. Choose from automatic or manual activation. The recommended choice is automatic. Provided your serial number is found at its storage location and has been correctly entered, no user interaction is required and no personal information is transmitted. If you do not activate the product at installation time, you will be invited to do this each time you invoke the program. PaperPort 14 can be launched only a limited number of times without activation.

Registration

Registration enables you to take full advantage of Nuance product support and to receive notifications of product updates.

When you finish installing PaperPort, you are prompted to register online. If you want to update your registration information, you can always go to the Nuance web site at <http://www.nuance.com> .

Learning PaperPort

This guide introduces you to PaperPort and shows you how PaperPort can help you manage your information. Additional sources of information to help you learn how to use PaperPort include a comprehensive Help system, the How-to-Guides, Release Notes, and the Nuance web site. Access these from the Help ribbon.

Using this Guide

This guide is written with the assumption that you know how to work in the Microsoft Windows environment. Refer to your Windows documentation if you have questions about how to use dialog boxes, menu commands, scroll bars, drag and drop functionality, shortcut menus, and so on.



Using Help

The PaperPort Help includes detailed information on features, settings, and procedures. Help is available from the PaperPort Help ribbon.

Additional technical support, including technical notes, software updates, product information and product support issues and more is available also from the PaperPort Help ribbon.

PDF Viewer Plus, and also PDF Converter Professional, have their own Help systems that include guidance on PDF creation.

Using release notes

PaperPort Release Notes provide important information about this release of the program. This document is included on the installation CD or DVD, from the PaperPort Help ribbon, and as a sample document on the PaperPort desktop.

Technical Support

Nuance offers both complimentary and fee-based technical support options designed to meet your individual needs. Our services offer person-to-person telephone and e-mail technical support. We also offer self-service, 24-hour access to our Knowledge Base.

Visit **<http://www.nuance.com>** for information about your support policy, local support contacts, and product updates. Before contacting Nuance, be sure to read the user documentation and review the Release Notes.

Minimum System Requirements

- Minimum hardware requirements:
 - Intel® Pentium® compatible or higher processor
 - 1 GB of memory (RAM)
 - 1.4 GB of free hard disk space for application files, installation and system updates
 - Windows-compatible pointing device
 - 1024 x 768 resolution display with 16-bit (High Color) or higher
 - A compatible scanner with its own scanner driver software
- Supported operating systems:
 - Windows XP 32-bit with SP3 or above
 - Windows Vista 32-bit and 64-bit with SP2 or above
 - Windows 7 in 32-bit and 64-bit versions
 - Windows 8 in 32-bit and 64-bit versions
- Supported web browsers:
 - Internet Explorer® 7 or above
 - Firefox® 3.6, 7 and 8
 - Chrome™ current version

A CD-ROM or DVD-ROM drive is needed for installation. Web access is needed for online activation, product registration, Scanner Wizard database updating, technical support and obtaining live updates for the program.



Performance and speed will be enhanced if your computer's processor, memory, and available disk space exceed minimum requirements. This is especially true when handling very large color image and PDF files.

What's new in PaperPort 14

PaperPort 14 includes a number of valuable new features to help you manage your documents:



Nuance Cloud Connector

This service connects your computer and PaperPort with other popular web-based storage sites, including Microsoft SkyDrive®, GoogleDocs™, Box®, multiple FTP sites, and many more. The Connector can integrate directly with Microsoft Windows providing easy drag-and-drop access directly to cloud services. The Nuance Cloud Connector is also upgradeable to a more feature-rich version of the product called Gladinet® Cloud Desktop Pro. This enhanced version adds additional functionality for using cloud services with automatic backup and file synchronization.



Evernote Connector

The Send To bar offers a link to the Evernote® web storage facility, so that PaperPort items can be transferred to this Cloud service.

Bookmark Web Pages

In addition to the ability to bookmark workspaces, PaperPort Professional allows favorite web pages to be bookmarked so they can be accessed with a single click. The bookmarks supplied with your default browser also appear in PaperPort.

Windows Shortcut menu inside PaperPort

Choose at installation time whether to allow the Windows shortcut menu for files of particular types to be available in the item's PaperPort shortcut menu.



New SET tools

Manual despeckling with a wide choice of algorithms yield better black-and-white images for optimum Optical Character Recognition (OCR) results.

New edge cleaning tools include automated punch-hole removal, auto-cropping pages, and border cleaning.

Access recently scanned and viewed documents

New controls in the Desktop ribbon or in a Windows 7 and Windows 8 Jump Lists let you quickly home in on documents that were recently viewed or created.

Key features

High-quality PDF performance

PDF files can be opened quickly and displayed in PDF Viewer Plus, a Nuance PDF handling application that is fully compatible with all leading PDF creation products. PDF Viewer Plus opens files faster than the general-purpose ImageViewer, reducing memory requirements and permitting smaller file sizes. The viewer optimizes the rendering resolution for each element on the page yielding a cleaner display and optimum print resolution.

PDF Viewer Plus provides annotations and dynamic or transparent stamps. Images within a PDF document processed by PDF Viewer Plus can be sent to the ImageViewer to be enhanced using SET tools, with the modified image returned to the PDF.

Fill and e-mail PDF forms and create new ones, either from scratch or using FormTyper in PDF Viewer Plus to instantly make any static form fillable. It uses Logical Form Recognition™ technology to detect the form elements and also allows their properties to be managed efficiently.

Searchable PDF files are available through Scanning Profiles, through a right-click **Save As** operation on the PaperPort Desktop, or directly in PDF Viewer Plus. This makes the content of your scanned paper documents or image files accessible to search engines such as Windows Desktop Search or Google.

Accurate OCR

Language settings can be applied to Optical Character Recognition to increase accuracy in all supported languages.

Digital camera input

It is possible to take a picture of a document with a digital camera and accurately convert it into a text document. This is done by applying special 3D-deskewing algorithms that flatten page images and correct distortions to increase the accuracy of the resulting text document.

Making PaperPort more reliable

Sometimes PDF files may become corrupted so that they can no longer be opened. In these cases PaperPort may not be able to generate a desktop thumbnail and this may prevent PaperPort from launching properly.

A utility program `CheckPPFolders.exe` is supplied in the PaperPort program folder, along with a short Help file. Run this program to identify and remove any corrupt files so that PaperPort will work properly.



The following advanced features are available only in PaperPort Professional:

Folder Management

You can automatically create multiple folders by importing a list of folder names from a text file. This option is available when you right-click on any folder. See the Help topic: *About PaperPort folders* for the required syntax.

PDF Create Assistant

You can create industry-standard text-based PDF documents from any application directly with a right-click through the Windows or PaperPort Desktops (up to PDF version 1.7), using the PDF Create Assistant or by printing directly from any application with the printer driver called **ScanSoft PDF Create!** You can create PDF packages, batch create PDF files and much more using the PDF Create Assistant. A table in the Help topic: *About creating PDF files* summarizes which starting places, inputs, options and targets are available.

Support for SharePoint®

PaperPort Professional is able to communicate with the Microsoft SharePoint Services 2003, SharePoint Portal 2003, SharePoint Services 2007 and SharePoint Server 2007 document management systems: get files from there, process them as desired, and then save the results by sending the output files back through the Send To bar. ScanDirect supports scanning to PDF with the results directed to SharePoint.

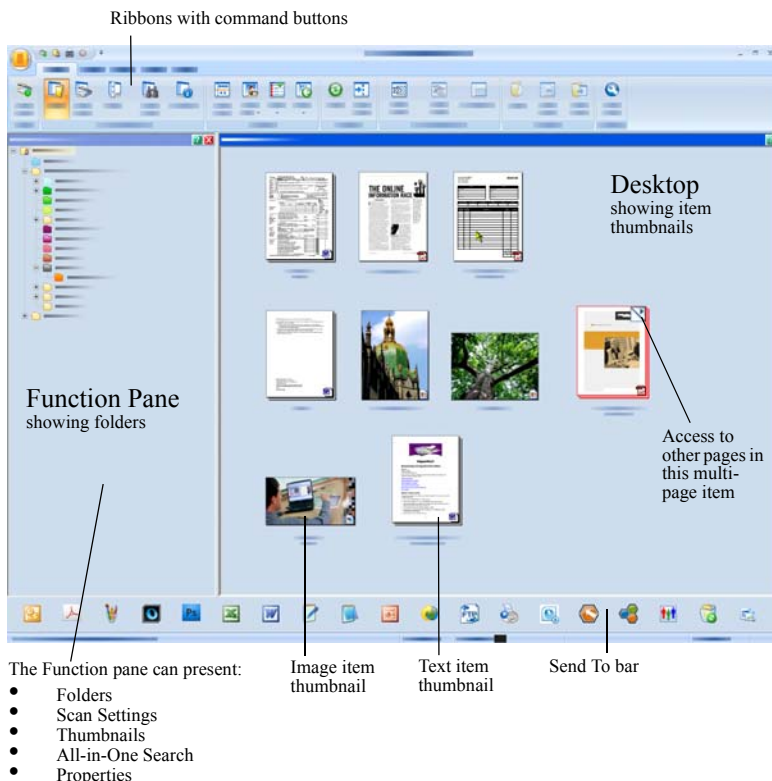
PaperPort is also supplied in Special Editions to selected scanner manufacturers and other resellers. The feature set in these editions may vary, in line with each vendor's requirements.

Getting to Know PaperPort

This section introduces you to the different parts of PaperPort. Refer to the PaperPort Help for detailed information about all these topics.

The PaperPort desktop

The PaperPort desktop appears with the Folders pane when you first start the program. It displays the documents in the chosen folder as thumbnails and provides tools to manage them. PaperPort offers all the tools necessary to organize, find, and use documents and images. Choose **Options** from the Desktop ribbon and go to the Desktop panel to choose a color scheme for the desktop and its elements.



The PaperPort Ribbon



PaperPort 14 and ImageViewer have a modern tab and ribbon interface. The main elements are:

1. The PaperPort button
2. Quick Access Toolbar (see page 24)
3. Tab
4. Ribbon associated with the tab
5. Group inside the ribbon
6. Button within the group
7. A button drop-down list.

PaperPort items

The documents and photographs you acquire in PaperPort are called items. There are two types of items: **image items** and **text items**.

- **Image items** are scanned documents, photographs, drawings and other digital items in an image format, such as PDF Image, PDF Searchable, JPEG, TIFF, or PaperPort Image files (these MAX files are read-only). They can be scanned, copied or imported into the PaperPort desktop.
- **Text items** are documents that contain editable text, such as Word (.doc), HTML, and Excel files, and are created by word processing and other text-based applications. Normal PDF files are considered to be text items.

Image items when double-clicked open by default in Image View that offers many image-handling tools, including the SET tools. Go to **Options**, then **Desktop** to change this behavior. You can choose ImageViewer; this offers the same functionality as Image View, but in a separate window so you can still view the PaperPort desktop as you edit the chosen item. This is especially useful in a dual-screen environment. You can also choose to open the item in the application associated with the file type.

You can use any flavor of PDF file: PDF Image, PDF Searchable, and PDF Formatted Text and Graphics (PDF Normal) with PaperPort. PDF files by default open in PDF Viewer Plus or (if available) PDF Converter Professional. Go to **Options**, then **Desktop** to change this behavior. You can open PDF Image or PDF Searchable files in ImageViewer in order to use the SET tools to improve the quality of PDF image-only items.

Use PaperPort to view non-PaperPort items that reside on your computer. Simply copy or move the document file or photo into a PaperPort folder.

You can quickly send an item to another program without leaving the PaperPort program. Just drag an item onto the link icon in the Send To bar at the bottom of the desktop. PaperPort supports a wide variety of programs including word processing, spreadsheet, fax, e-mail, graphics, optical character recognition (OCR), and online services programs.



The MAX to PDF converter

MAX files have long been the proprietary PaperPort image item format. This functionality has now been taken over by the universal PDF file type. In PaperPort 14, MAX files retain limited functionality: they can be viewed page-by-page but cannot be annotated, stacked or otherwise edited. Metadata (author, subject, keywords...) cannot be added in PaperPort 14, only already existing texts remain. In other words, MAX files are now read-only.

Therefore, Nuance offers a Wizard-like program to convert MAX files to PDF. Find the MAX to PDF converter in the PaperPort sub-menu in the Windows Start menu. It can create PDF Image or PDF Searchable files by running OCR on text in the MAX file. The converter allows annotations to be transferred to the resulting PDF. Language choices are available separately for the MAX file content and for its annotations. The converter can automatically find all MAX files within your PaperPort folders.

MAX files can be detected and imported into PaperPort Professional by DesktopDelivery™. They can be exported to some other programs (for instance to mailing applications, or to OmniPage for OCR).

The Folders pane



The Folders pane presents a hierarchical view of your PaperPort folders, similar to the view you see in Windows Explorer. Use the Folder Tools to access its commands quickly.

PaperPort installs a PaperPort folder named **My PaperPort Documents** into your **My Documents** folder. If you are using a multi-user system, each user has their own **My PaperPort Documents** folder.

The **My PaperPort Documents** folder contains several subfolders whose names – such as **Articles**, **Business Cards**, **Photographs**, and **Receipts** – illustrate the different ways you can organize your items in PaperPort.

The **Samples** folder contains sample documents and photographs to help you get started using PaperPort. This *Getting Started Guide* is placed in the **Samples** folder as a read-only PDF file. We recommend you copy the item and remove the read-only property from the copy if you want a text file (PDF Normal) for experimentation.



Choose **Folders** to view the Folders pane to view the pre-supplied folders. Select a folder, right-click and choose **Create New Folder** to add an empty subfolder with a name and color you choose. You can use the Folder Manager to add existing folders and sub-folders from your file system. This lets you set up a different view of folders than exists on your computer – tailoring it to work you will do via PaperPort.



Choose **Folder Manager** on the Tools ribbon or right-click in the Folders pane and choose **Folder Manager**. Click **Add** and browse to an existing folders or sub-folder. They are added as top-level folders to the PaperPort desktop along with their sub-folders and content. For instance, if you chose C:\MyReports\Fourth Quarter, this appears in PaperPort as **Fourth Quarter on C**. To later see the full path of an added folder, right-click and choose **Properties**.

Right-click on a folder to change folder color, add folder notes, create new sub-folders, and (in PaperPort Professional) set DesktopDelivery options.

The Folder Manager lets you rename, remove and reorder the top-level folders it manages. This does not affect the names, locations or existence of those mapped folders in your computer. Sub-folders that you rename or reorder which were not added using the Folder Manager are really renamed or moved in your system.

Deleting folders

Any sub-folder in PaperPort can be deleted using its shortcut menu or the Delete key. This means it disappears from PaperPort and also from your computer's disk system. Any sub-folders of the chosen folder are also deleted. A warning message asks you to confirm this deletion. Only top-level folders cannot be deleted inside PaperPort. The folder **My PaperPort Documents** is a sub-folder.

Removing folders

Any folder or sub-folder added to PaperPort via the Folder Manager becomes a top-level folder and it can be later removed using the Folder Manager again. This means it disappears from PaperPort but remains on your computer's disk system. When a top-level folder is removed, all its sub-folders are also removed.

PaperPort item thumbnails



There are two kinds of thumbnails in PaperPort: item and page thumbnails. Each item thumbnail is a small, graphic representation of your document or photo. Page thumbnails show pages of image items and PDF files in the Page Thumbnails pane both on your PaperPort desktop and in the ImageViewer.

One quick way to locate your PaperPort items is to visually browse through the item thumbnails on your PaperPort desktop. Thumbnails show you what's in a document without having to open it. Thumbnails give you the ability to scroll through the pages of a document without opening it.

PaperPort shows large, clear thumbnails of all your documents and photos, including:

- Scanned pages and photos
- Photos from your digital camera
- Image files in formats such as BMP, TIFF, JPEG, GIF, and MAX (read-only)
- Microsoft Word, PowerPoint, Excel, Corel WordPerfect, and other documents created in popular software programs
- PDF documents
- PDF Image items
- HTML documents

Each item thumbnail appears with an icon that identifies the program in which it was created or is currently associated.

Click on a thumbnail to see image attributes:



indicates that the Read-only attribute is set for that item.




indicates that the image has annotations.



icon information on author, keywords, tips and features.



indicates that the PDF file has searchable text.

Multi-page image items (TIFF, DCX, PDF, MAX, etc.) show  to let you scroll through the pages even with the Page Thumbnails pane closed.

Before you can work with an item, you must first select its thumbnail on the PaperPort desktop. A red border appears around an item to indicate that it is selected. Multiple selections are possible. While working with item thumbnails, you can:

- Drag a thumbnail to reposition it on the PaperPort desktop.
- Drag a thumbnail to a folder to move the item to that folder.
- Drag a thumbnail to another open Workspace to move the item to that open folder.

- Double-click a thumbnail to view the item.
- Press the **Ctrl** key and double-click a thumbnail to open the item in its source program.
- Right-click a thumbnail to display the item's shortcut menu.
- Drag a thumbnail to the Send To bar to send a copy of the item to another program.
- Right-click a thumbnail and select **Save Thumbnail** to save a thumbnail image as a separate image file (JPEG, PNG, TIFF and BMP formats supported).

Using item thumbnails on the PaperPort desktop, you can also easily combine individual PaperPort Image items or PDF Image items into multi-page items. This feature is useful as an organizational tool if you are using a scanner that can only scan a page as a separate item.

If you are not seeing thumbnails, right-click in the Workspace or use the **Change View** button and choose **Thumbnails**. Other choices are large or small icons, a list or a list with details.

PaperPort page thumbnails

The Page Thumbnails pane on the PaperPort desktop and in ImageViewer displays thumbnails for multi-page image items. Select a multi-page image item, then click the **Thumbnail** button on the Desktop ribbon. Page-level operations can be done quickly without having to open the files. You can:

- Enlarge or reduce thumbnail size (all image items and PDF files of all flavors).
- Copy selected pages to a Workspace as separate PDF files (from all non-PDF image items)
- Move selected pages to a Workspace as separate PDF files (from all non-PDF image items except MAX files)
- Copy and move pages between documents open in different panes. (from all image items except MAX files)

The following operations are available for PDF files, on the PaperPort desktop or in PDF Viewer Plus:

- Copy, paste, cut, delete and reorder pages.
- Insert new pages at a certain location in the document.
- Append new pages at the end.



The Page Thumbnail view of a secure PDF is only available by supplying its password.



Two-part desktop

When you first start PaperPort Professional, the desktop appears split into two Workspaces – top and bottom. This layout gives you a better oversight necessary to organize and combine your documents more effectively even in a cross-folder fashion. Commands always relate to the currently active desktop.

If the Desktop is not split, select **Split Desktop** from the View group in the Desktop ribbon. Click it again to remove the split.

If you work with documents containing multiple pages, you can use the corresponding function pane to view page thumbnails without having to open the given document. You can also use these desktop areas to view your folders, or the properties of the selected item.

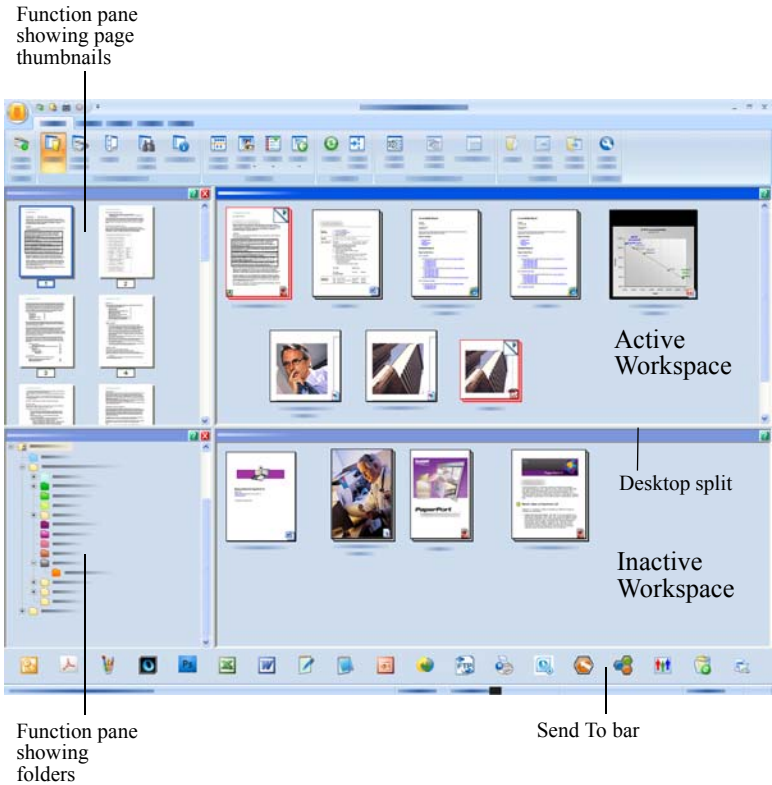


Bookmarks

You can bookmark the Workspaces of your choice by using the **Bookmark Workspace** command from the Workspace group in the Desktop ribbon. To manage workspace bookmarks, use the **Organize Bookmarks** command. Getting to a frequently used Workspace is just a mouse click away, since they are all displayed in the same list. Other buttons in the group let you return quickly to recently open or scanned items.

You can also bookmark favorite web pages, using the web bookmarks in the Extras group of the Tools ribbon. The delivery bookmarks in your default browser are already added, select a new web page and click the button to bookmark it.

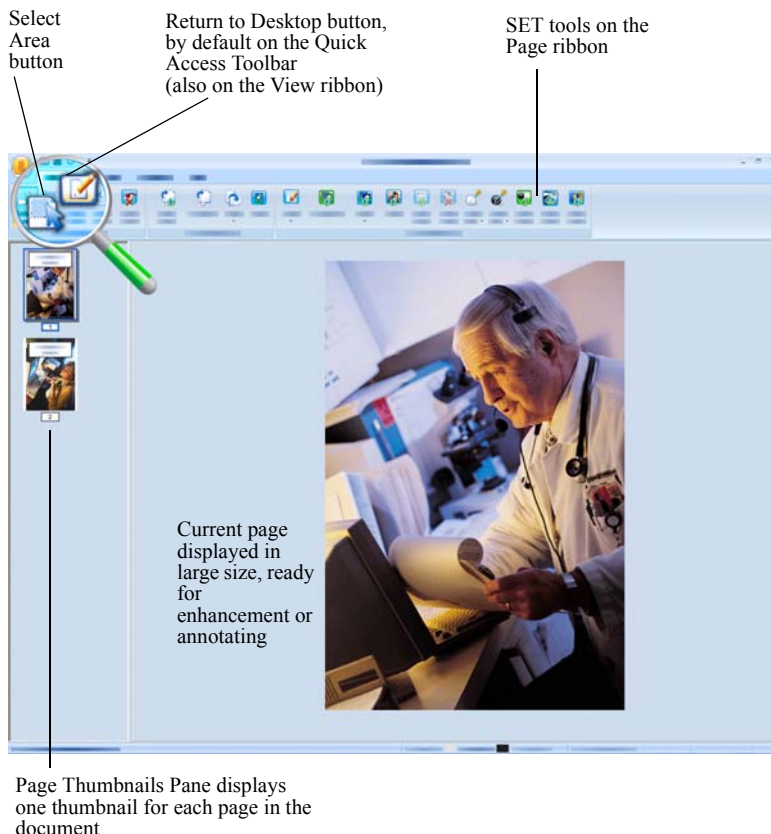
The following picture shows a split desktop:



The Image View window

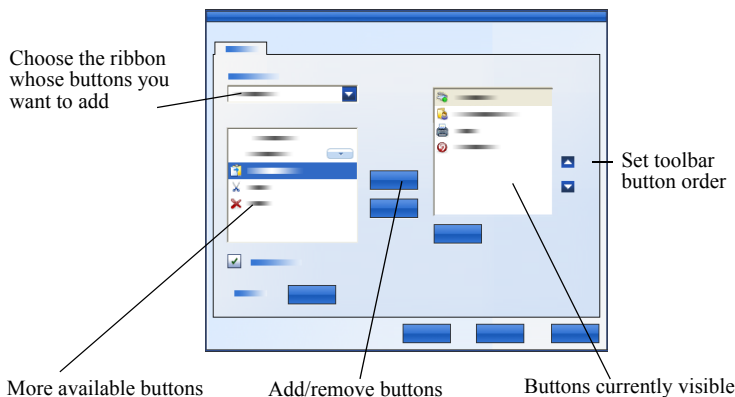
To view an image item in the Image View window, double-click its thumbnail in Desktop view, or choose **Open with Image View** on the Desktop ribbon or from its shortcut menu. By default PDF files appear in PDF Viewer Plus, not in Image View.

The Image View window allows you to take a closer look at your items and to touch up and annotate them. You can also enlarge or reduce the view for easy reading. Use the SET tools to enhance the current page image. Use the Page Thumbnails pane to edit your document at page level.



Customizable Quick Access Toolbar

PaperPort's buttons are placed on different ribbons according to their functionality. You can place frequently used buttons on the Quick Access Toolbar in PaperPort and also in ImageViewer. Right-click within the ribbons area and choose **Customize Quick Access Toolbar**.



PDF Viewer Plus

PDF files on the PaperPort desktop when double-clicked appear by default in PDF Viewer Plus. You can drag other files onto the PDF Viewer Plus icon in the Send To bar (see page 47) to have a copy converted to PDF and opened in the PDF Viewer. The first page appears in the main screen area; a navigator panel on the left shows page thumbnails or form controls and a comments panel can be displayed along the bottom of the screen. An organizer panel on the right offers stamps. The PDF annotation tools are described on page 37. If an image-only PDF enters the PDF Viewer, the program may offer to make it searchable. If not, choose **Make Searchable PDF** from the Tools menu.

Active PDF forms can be filled in directly in PDF Viewer Plus. Static forms, for instance ones scanned to PaperPort, can be turned into fillable forms by using FormTyper, as described on page 51.

PDF files opened from the PaperPort desktop return there when you finish editing or annotating them with all the updates included.

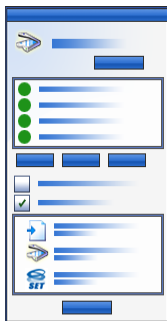
Acquiring Items

There are many ways to bring images and documents into PaperPort so that you can use PaperPort's viewing, editing, annotation, indexing, OCR, and file management tools. For example, you can:

- Scan photos, pages, and other images on a scanning device.
- Add folders to PaperPort that already contain images and documents.
- Import files from other programs on your computer.
- Download files from web storage sites via Nuance Cloud Connector.
- Print documents from other programs to the PaperPort desktop.
- Drag or cut-and-paste images and documents from Windows Explorer, or other programs to the PaperPort desktop.
- Acquire photos from a digital camera.
- Bring files into PaperPort Professional using DesktopDelivery.
- Print web pages to PDF files for use in PaperPort.



Scan to the PaperPort desktop



PaperPort is designed to work with TWAIN-, WIA-, and ISIS-compatible scanners.

Click the **Scan Settings** button to display the Scan or Get Photo pane. Choose a scan profile. Profiles are optimized for typical scanning tasks.

Then choose between using the native interface of the scanner or utilizing the new Scanner Settings pane of PaperPort for best scanning results. To use the interface of the scanner driver, mark the checkbox **Display scanner dialog box**. Leaving it empty will put the scanned item onto the active Workspace.

Turn on the Capture Assistant to add subject, author and keywords to items and (in PaperPort Professional) to view and control scanning progress.

When the scan is complete, you will see your item on the PaperPort desktop.



If your scanner does not use a TWAIN, WIA or ISIS device driver, use the program that came with your scanner to scan items. Then, copy or move the scanned items to PaperPort. Refer to the PaperPort Help for more information about scanning.

PaperPort makes it easy to scan pages as separate items or as a multi-page item. To scan and collate two-sided pages on your ADF scanner, flip the pages when prompted, click **Scan Other Side**, and PaperPort will automatically scan and collate the pages in the correct order.

You can also use your scanner device buttons to scan directly into PaperPort. Open the Windows system, choose **Scanners and Cameras**, choose an event in the **Events** tab, and assign PaperPort to it.



You can also use a high-speed, networked scanner to scan items to a networked folder and then add the folder to PaperPort. Use DesktopDelivery (available in PaperPort Professional) to monitor folders for incoming scanned images.

Set up your scanner with PaperPort



Before using PaperPort for scanning, your scanner should be installed with its own scanner driver software and tested for correct functionality. Scanner driver software is not included with PaperPort.

Properly installed and correctly functioning scanners are immediately available in PaperPort by clicking the **Select** button, and choosing one in the **Available Scanners** dialog.

If you are not satisfied for your scan results, you can run the PaperPort Scanner Setup Wizard from the Start menu, under the program group PaperPort 14.

Using Scan Profiles

PaperPort comes with scan profiles optimized for typical scanning tasks. Choose Black and White, Grayscale or Color Document, Color Photograph, Color Searchable PDF Document, or Color PDF-MRC High Compression.

Scan profile panels have the following tabs:

- **Profile:** Displays the currently used scan profile.
- **SET:** Define enhancements to be run automatically.
- **Output:** Set file format and automatically suffixed file names.
- **Scan:** Adjust scan settings: mode, resolution, size, orientation, filter color, brightness and contrast.

In PaperPort Professional, you can add new profiles, or remove existing ones. This edition of the program contains an extra scan profile: Color PDF-MRC High Compression. MRC is a technology that lets you make smaller PDF files, especially in documents with colored backgrounds.



Print to PaperPort

To bring items in from other programs, print them to the PaperPort desktop as PDF Image or PDF Searchable. The default is PDF Image; go to **Desktop**, then **Options** and **Item** to change it. This lets you quickly import spreadsheets, pictures, database files, word processing files, and other files into PaperPort as PDF items on the PaperPort desktop. This works through the File menu (or equivalent) in the source application; choose **Print to PaperPort** or choose **Print**, then choose **PaperPort Image Printer**.

With PaperPort Professional, you can use PDF Create add-in buttons in Office applications to make a PDF from the current document or attachment in the Formatted Text & Graphics (PDF Normal) format. Do this also by choosing **Print** and selecting **ScanSoft PDF Create!** as the printer name. Choose **Print** in your web browser to create print-formatted views of web pages. The printer called **PaperPort Image Printer** gives you PDF Image or PDF Searchable files, the **ScanSoft Printer** gives you Normal PDF.

In all cases, PaperPort is launched if not running and the PDF file is placed on the current desktop.



Capture web pages

Capture web pages from the Internet and save them as PDF items on the PaperPort desktop.

This Web Capture program is installed with PaperPort, but is not integrated into it, since it functions only on the Windows XP operating system. Go to the program folder and double-click `PPwebcap.exe`. It places an icon on the system tray; use its shortcut menu to access settings (for instance to specify PDF image or PDF searchable) and to capture web pages – either whole pages or the visible area.



Use the Print to PaperPort feature to create searchable PDF files from web pages, so they can be added to the All-in-One Search™ index for finding items by text content. This means of capturing web pages is available under all operating systems.



Add PaperPort folders




PaperPort provides an easy-to-use filing system for organizing your items and sharing them with others. In the Folders pane, you can:

- Add existing folders on your computer to the Folders pane.
- Create new folders, mapped network drives and folders on external attached devices.

Initially, the Folders pane shows a set of folders designed to help you get started using PaperPort. You can move or delete these folders whenever you prefer. If you choose a custom installation, you can add your own folders at that time.

Any time later, you use the Folder Manager to add folders already on your computer to the Folders pane, including network folders and folders on external devices attached to your computer. Documents within these folders are then available for use within PaperPort.

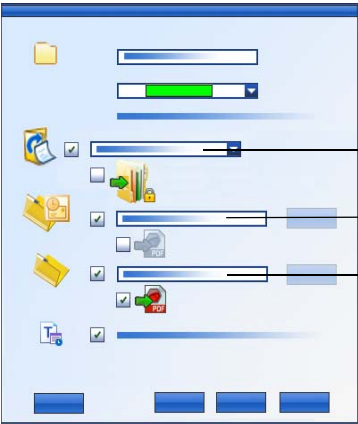
Refer to the PaperPort Help for more information about adding and using PaperPort folders.



Use Folder Notes to assign the same file information to all PDF files arriving in a folder of your choice through scanning or DesktopDelivery.

Use DesktopDelivery

DesktopDelivery (PaperPort Professional only) monitors network or local folders for incoming files of specified types (PDF, TIFF, JPEG and MAX). It can also monitor e-mail folders for attachments. It imports these files to specified PaperPort DesktopDelivery folders (i.e. PaperPort folders designated to receive files from a monitored folder outside PaperPort). Right-click on any PaperPort folder and select **DesktopDelivery** from the shortcut menu.



Automatically applied Folder Notes to password protected documents

Monitored e-mail Inbox folder

Monitored folder

The screenshot shows a configuration window with several rows. Each row has a checkbox on the left, a folder icon, a text field, and a dropdown menu. The first row has a folder icon and a text field. The second row has a folder icon, a checkbox, a text field, and a dropdown menu. The third row has a folder icon, a checkbox, a text field, and a dropdown menu. The fourth row has a folder icon, a checkbox, a text field, and a dropdown menu. The fifth row has a folder icon, a checkbox, a text field, and a dropdown menu. The sixth row has a folder icon, a checkbox, a text field, and a dropdown menu. The seventh row has a folder icon, a checkbox, a text field, and a dropdown menu. The eighth row has a folder icon, a checkbox, a text field, and a dropdown menu. The ninth row has a folder icon, a checkbox, a text field, and a dropdown menu. The tenth row has a folder icon, a checkbox, a text field, and a dropdown menu. The eleventh row has a folder icon, a checkbox, a text field, and a dropdown menu. The twelfth row has a folder icon, a checkbox, a text field, and a dropdown menu. The thirteenth row has a folder icon, a checkbox, a text field, and a dropdown menu. The fourteenth row has a folder icon, a checkbox, a text field, and a dropdown menu. The fifteenth row has a folder icon, a checkbox, a text field, and a dropdown menu. The sixteenth row has a folder icon, a checkbox, a text field, and a dropdown menu. The seventeenth row has a folder icon, a checkbox, a text field, and a dropdown menu. The eighteenth row has a folder icon, a checkbox, a text field, and a dropdown menu. The nineteenth row has a folder icon, a checkbox, a text field, and a dropdown menu. The twentieth row has a folder icon, a checkbox, a text field, and a dropdown menu. The twenty-first row has a folder icon, a checkbox, a text field, and a dropdown menu. The twenty-second row has a folder icon, a checkbox, a text field, and a dropdown menu. The twenty-third row has a folder icon, a checkbox, a text field, and a dropdown menu. The twenty-fourth row has a folder icon, a checkbox, a text field, and a dropdown menu. The twenty-fifth row has a folder icon, a checkbox, a text field, and a dropdown menu. The twenty-sixth row has a folder icon, a checkbox, a text field, and a dropdown menu. The twenty-seventh row has a folder icon, a checkbox, a text field, and a dropdown menu. The twenty-eighth row has a folder icon, a checkbox, a text field, and a dropdown menu. The twenty-ninth row has a folder icon, a checkbox, a text field, and a dropdown menu. The thirtieth row has a folder icon, a checkbox, a text field, and a dropdown menu. The thirty-first row has a folder icon, a checkbox, a text field, and a dropdown menu. The thirty-second row has a folder icon, a checkbox, a text field, and a dropdown menu. The thirty-third row has a folder icon, a checkbox, a text field, and a dropdown menu. The thirty-fourth row has a folder icon, a checkbox, a text field, and a dropdown menu. The thirty-fifth row has a folder icon, a checkbox, a text field, and a dropdown menu. The thirty-sixth row has a folder icon, a checkbox, a text field, and a dropdown menu. The thirty-seventh row has a folder icon, a checkbox, a text field, and a dropdown menu. The thirty-eighth row has a folder icon, a checkbox, a text field, and a dropdown menu. The thirty-ninth row has a folder icon, a checkbox, a text field, and a dropdown menu. The fortieth row has a folder icon, a checkbox, a text field, and a dropdown menu. The forty-first row has a folder icon, a checkbox, a text field, and a dropdown menu. The forty-second row has a folder icon, a checkbox, a text field, and a dropdown menu. The forty-third row has a folder icon, a checkbox, a text field, and a dropdown menu. The forty-fourth row has a folder icon, a checkbox, a text field, and a dropdown menu. The forty-fifth row has a folder icon, a checkbox, a text field, and a dropdown menu. The forty-sixth row has a folder icon, a checkbox, a text field, and a dropdown menu. The forty-seventh row has a folder icon, a checkbox, a text field, and a dropdown menu. The forty-eighth row has a folder icon, a checkbox, a text field, and a dropdown menu. The forty-ninth row has a folder icon, a checkbox, a text field, and a dropdown menu. The fiftieth row has a folder icon, a checkbox, a text field, and a dropdown menu. The fifty-first row has a folder icon, a checkbox, a text field, and a dropdown menu. The fifty-second row has a folder icon, a checkbox, a text field, and a dropdown menu. The fifty-third row has a folder icon, a checkbox, a text field, and a dropdown menu. The fifty-fourth row has a folder icon, a checkbox, a text field, and a dropdown menu. The fifty-fifth row has a folder icon, a checkbox, a text field, and a dropdown menu. The fifty-sixth row has a folder icon, a checkbox, a text field, and a dropdown menu. The fifty-seventh row has a folder icon, a checkbox, a text field, and a dropdown menu. The fifty-eighth row has a folder icon, a checkbox, a text field, and a dropdown menu. The fifty-ninth row has a folder icon, a checkbox, a text field, and a dropdown menu. The sixtieth row has a folder icon, a checkbox, a text field, and a dropdown menu. The sixty-first row has a folder icon, a checkbox, a text field, and a dropdown menu. The sixty-second row has a folder icon, a checkbox, a text field, and a dropdown menu. The sixty-third row has a folder icon, a checkbox, a text field, and a dropdown menu. The sixty-fourth row has a folder icon, a checkbox, a text field, and a dropdown menu. The sixty-fifth row has a folder icon, a checkbox, a text field, and a dropdown menu. The sixty-sixth row has a folder icon, a checkbox, a text field, and a dropdown menu. The sixty-seventh row has a folder icon, a checkbox, a text field, and a dropdown menu. The sixty-eighth row has a folder icon, a checkbox, a text field, and a dropdown menu. The sixty-ninth row has a folder icon, a checkbox, a text field, and a dropdown menu. The seventieth row has a folder icon, a checkbox, a text field, and a dropdown menu. The seventy-first row has a folder icon, a checkbox, a text field, and a dropdown menu. The seventy-second row has a folder icon, a checkbox, a text field, and a dropdown menu. The seventy-third row has a folder icon, a checkbox, a text field, and a dropdown menu. The seventy-fourth row has a folder icon, a checkbox, a text field, and a dropdown menu. The seventy-fifth row has a folder icon, a checkbox, a text field, and a dropdown menu. The seventy-sixth row has a folder icon, a checkbox, a text field, and a dropdown menu. The seventy-seventh row has a folder icon, a checkbox, a text field, and a dropdown menu. The seventy-eighth row has a folder icon, a checkbox, a text field, and a dropdown menu. The seventy-ninth row has a folder icon, a checkbox, a text field, and a dropdown menu. The eightieth row has a folder icon, a checkbox, a text field, and a dropdown menu. The eighty-first row has a folder icon, a checkbox, a text field, and a dropdown menu. The eighty-second row has a folder icon, a checkbox, a text field, and a dropdown menu. The eighty-third row has a folder icon, a checkbox, a text field, and a dropdown menu. The eighty-fourth row has a folder icon, a checkbox, a text field, and a dropdown menu. The eighty-fifth row has a folder icon, a checkbox, a text field, and a dropdown menu. The eighty-sixth row has a folder icon, a checkbox, a text field, and a dropdown menu. The eighty-seventh row has a folder icon, a checkbox, a text field, and a dropdown menu. The eighty-eighth row has a folder icon, a checkbox, a text field, and a dropdown menu. The eighty-ninth row has a folder icon, a checkbox, a text field, and a dropdown menu. The ninetieth row has a folder icon, a checkbox, a text field, and a dropdown menu. The ninety-first row has a folder icon, a checkbox, a text field, and a dropdown menu. The ninety-second row has a folder icon, a checkbox, a text field, and a dropdown menu. The ninety-third row has a folder icon, a checkbox, a text field, and a dropdown menu. The ninety-fourth row has a folder icon, a checkbox, a text field, and a dropdown menu. The ninety-fifth row has a folder icon, a checkbox, a text field, and a dropdown menu. The ninety-sixth row has a folder icon, a checkbox, a text field, and a dropdown menu. The ninety-seventh row has a folder icon, a checkbox, a text field, and a dropdown menu. The ninety-eighth row has a folder icon, a checkbox, a text field, and a dropdown menu. The ninety-ninth row has a folder icon, a checkbox, a text field, and a dropdown menu. The hundredth row has a folder icon, a checkbox, a text field, and a dropdown menu.

You can apply Folder Notes to password protected documents and monitor e-mail inbox folders and network or local folder. Refer to the PaperPort Help for details.



Import pictures from your camera

To bring digital photos on the PaperPort desktop, first plug your camera in. If your device is displayed as a drive you can start acquiring your files. If your camera does not support this kind of operation, and its driver is installed properly, its TWAIN, WIA or ISIS interface will display enabling you to import images from it.



Do not edit the images on your camera in place – not all editing produces the desired result first time. Instead, bring your files into PaperPort and use the SET tools to enhance them.

Touching Up Images



When you display an image item in the Image View or ImageViewer window, PaperPort provides tools you can use to adjust or improve your image.

For example, you can straighten a scanned page, lighten an underexposed photograph that is too dark, adjust the color in a color picture, remove ‘dirt spots’ from a document page, clear shadows and spots from page edges, or sharpen fuzzy pictures. In addition, you can rotate an item, remove stray dots, enhance lines, remove red eye, and crop part of an image.

Some SET Tools are primarily designed for photo, or image enhancement, while others (shaded) help you prepare items containing text for Optical Character Recognition (OCR).

In the Image View window the Page ribbon contains the SET tools to modify the current page. Some of these tools are also available on the PaperPort desktop for use with all pages in the selected item.

Scanner Enhancement Technology tools

The availability is shown like this:

P = Image View or ImageViewer (Page ribbon) to change the current page only.

PI = Also on PaperPort desktop (Item ribbon) to change all pages in selected item(s).

PM = Also in PaperPort desktop shortcut menu to change all pages in selected item(s).

PS = Also available in a Scanning Profile to modify all incoming images.



Select Area
(P)

Use the **Select Area** tool to select part of an image you want to cut, copy, or delete with commands on the Page ribbon or shortcut menu. Use it to select part of an image for cropping, using the **Remove Red Eye**, **Erase Inside** or **Erase Outside** tools.



Rotate
(PI)

Click the **Rotate** tool to rotate the selected page or item 90 degrees to the left, right or by 180 degrees.



Straighten
an image

Sometimes a document is crooked when scanned. When this occurs, you can use the **Straighten** (P) and **Auto-Straighten** (PSI) tools to adjust it. Straightening lines of text in a black-and-white image file will yield better OCR results.



Auto-enhance
(PSI)

The **Auto-Enhance** feature adjusts the brightness and contrast, color, and tint of an image or item. PaperPort analyzes the image and tries to correct whatever is wrong with it.



Enhance
an image
(P)

You can manually adjust your image using the **Enhance** tool. It lets you change brightness, contrast, color and tint values and choose the best result from nine candidates, as shown on page 33.



Sharpen
an image
(P)

Select the **Sharpen** tool to adjust the sharpness of a blurry picture or blur a sharp image for special effect.



Remove
red eye
(P)

The **Remove Red Eye** tool helps you to remove the red-eye effect from a selected part of a picture. Red Eye may occur when photographing people or animals in low light or with a flash.



Remove
part of
an image

Use the **Selection** tool to define the part you want to keep and use the **Crop** tool (PS) to remove the remainder. Select the **Eraser** tool (P) to erase an image area that you draw over with the pointer.



Resize
(PSI)

Resize an image or item and/or change its resolution or define these settings for a scanning profile. (Colors can also be converted or inverted).



Remove
stray dots
(PM)

Scanned images sometimes include dots or speckles. The **Stray Dots** tool automatically finds and removes such 'dirt' from a page. Use it for better OCR results on black-and-white images.












Improve lines
(PM)

The **Improve Lines** tool (for black-and-white images) darkens lines and connects broken lines in a table or form to appear darker and straighter. The use of this tool will render better recognition results.



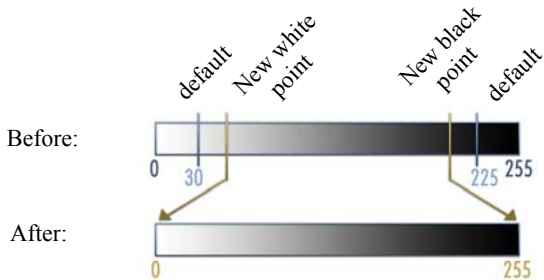
Erase
outside
(PS)

Use this tool to clear shadows and spots from page edges to improve OCR performance. Called **Erase Edges** in the Scan profile. There is also an **Erase Inside** tool (P).

	Invert colors	Use this tool to change the image to inverted color values. (PMI)
	Convert color	Use this tool to change color images to grayscale, halftone or black-and-white. (PMI)
	Punch-hole removal	Remove hole marks from page sides, replacing them with the background color. (PMIS)
	Auto-Crop	This tool crops images according to pixel settings you provide. (PMIS)
	Black border cleaning	This tool removes scanning shadows from page margins. (PMIS)
	Despeckle	This tool cleans black-and-white images using a chosen despeckling type. (PMI)
	Set white point (P)	Click this tool, then click on a light color in the image that will become the white point. See below.
	Set black point (P)	Click this tool, then click on a dark color in the image that will become the black point. The colors chosen for the new white and black points are displayed on the Status bar.
	Apply current black and white points	Click this tool to apply the new black and white points to the current image (P) or item (I). If the result is not acceptable, undo your changes and pick new values.

Change black and white points to improve image quality by removing the dark and overexposed areas. All colors lighter than a chosen white point will become white. All colors darker than a chosen new black point are set to black.

A typical use for this is to remove a shaded gray background in a document you want to OCR. Select one of the darker gray pixels from the background and apply it as the white point. Then the background will become white. Changing black and white points for a color photo will typically increase its contrast, but may also change color values.



You can apply new black and white points to individual images, as described. You can also apply them as an auto-enhancement to all new pages scanned with a given scan profile.

Convert Color choices



Color



Grayscale



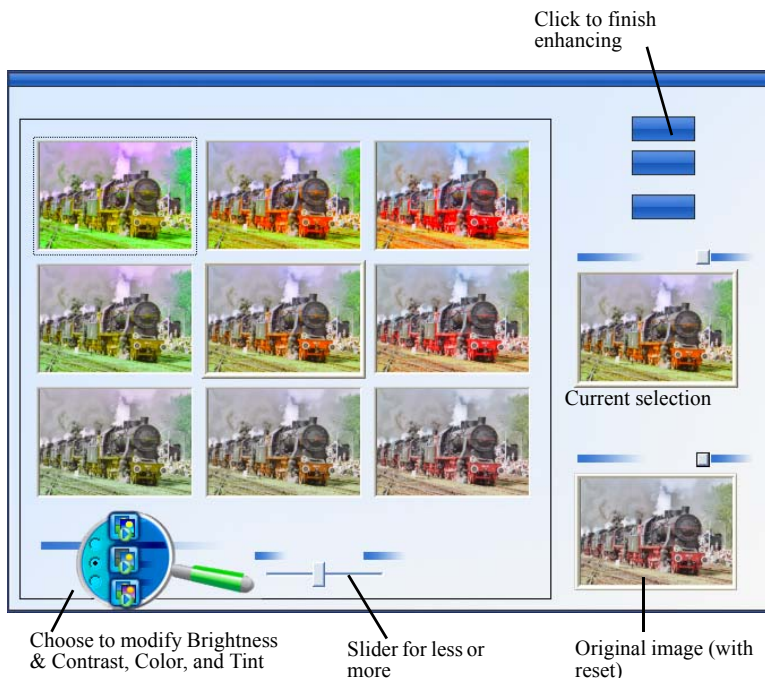
Halftone



Black-and-white

Enhancing Images Manually

Choose **Enhance** from the Page ribbon in Image View to receive nine candidate variants of your picture. Adjust brightness and contrast, color, or tint, then double-click the desired image. It is placed in the center and becomes the new original. The first original remains and can be reset.



Edit multiple images

The ability to process items as a group is often referred to as batch processing. PaperPort provides batch processing features so that you can quickly enhance, modify, or rotate multiple image items in a single operation. Select one or more image items on the desktop, and then, on the Item ribbon, choose the desired command. See the Help for more information.

Annotating Pages

PaperPort includes a collection of annotation tools that allow you to mark up scanned documents with information you would like to keep with that document. For a wider offering of PDF annotation tools use the supplied Nuance PDF product. All other image items must be annotated in Image View or ImageViewer, but remember that you can drag any of these files onto the Nuance PDF product icon on the Send To bar to have them converted to PDF Image or PDF Searchable, ready to be annotated or otherwise edited.

In PDF files, annotations are editable, meaning that you can reposition, change, remove them, or edit textual content whenever you want. On other types of image items, such as JPEG and Windows Bitmap files, annotations become a permanent part of the image when you save the item. For item types that cannot accept annotations, PaperPort automatically disables the annotation tools.

Using PaperPort's annotation tools, you can add notes and text, highlight text, draw lines and arrows, or stamp a picture onto an image item.

It is easy to send a document with annotations to people without PaperPort by using the PDF Image or PDF Searchable format. The recipient only has to double-click on the e-mail attachment they receive from you and they will see the document in the system default PDF viewer – annotations intact.

Annotation tools

You can select an annotation tool from the Annotation ribbon whenever you display an image item in the Image View window. Use commands in the Annotation Settings group to change properties for future annotations created with that tool. This does not affect existing annotations. To turn off any annotation tool, click a different one – the **Select Annotation** tool is usually the best for this. See a detailed list of these tools in Help.

We detail here the annotation tools available in PDF Viewer Plus for use with PDF files.

Use the following commands in PDF Viewer Plus:



Hand

Select this tool and click in an annotation to move, cut, copy, or resize it on the page. Double-click on a note or text box to edit its text. Right-click on a selected annotation to change its status or properties.



Note

Want to give yourself a reminder? Select the **Note** tool and add a resizable note much like a sticky note that you write on and then stick on paper documents. You can shrink the note to an icon. Right-click to access note properties. Double-click to re-open the note.



Text Box

Adding a text label to your images is simple with the **Text** tool. Select this tool to enter text whose properties you can set in **Edit**, then **Preferences** and **Comment**.



Highlight

Use the **Highlighter** tool to highlight selected text on the page or in a text box, just as you might use a highlighting pen on paper.



Pencil

The **Pencil** tool lets you draw freehand lines on the page.



Line

Select **Line** tool to draw straight lines; right-click and choose properties to make arrows and further format the line.



Stamp

The **Stamp** tool lets you paste supplied stamps or bitmapped images of your choice on the page, much like using a rubber stamp.



Protecting Items



In PaperPort Professional, you can adjust the security level of your PDF files (supported up to format 1.7). When you create a new PDF from existing ones (for example, by copying a thumbnail of a page onto a Workspace) its security settings will be the same as those of the original one. Newly created PDF files will be generated according to the default PDF security settings in PaperPort, as specified on the Item ribbon.

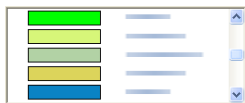
There are two types of passwords in the program. The open password restricts document accessibility: you can only open it by supplying the password when prompted. The permissions password allows users to define how the document may be used. If it is not specified, further use of the file is possible without any restrictions.



Filing Items

A key to organizing items in PaperPort is filing items in appropriate folders. You can drag and drop items from one folder to another or from the PaperPort desktop into any folder you want. You can specify search criteria to help you find your items later.

Moving and copying items between folders is also possible in split view across Workspaces. The name of each item appears below the thumbnail in thumbnail view. In a multi-page item, the name appears below the individual page names.



Using the Folder Manager dialog box, you can add, remove, move, and rename PaperPort folders. You can change the color of a folder icon to one that helps you organize your items.

You may also add, remove, move, and rename any folder in Windows Explorer that is viewed with the PaperPort folder structure. These changes will be automatically reflected in PaperPort.

In the Folders pane, you can drag and drop, copy or move subfolders and their content to other subfolders or PaperPort folders, create or delete subfolders; or add Folder Notes. Sharing and Security, and DesktopDelivery adjustments can also be directly made for each folder shortcut menu.



The **Back** button makes it easy to step through the ordered history of folders you recently visited one by one – functioning similarly to Internet Explorer – enhancing quick backward navigation for both Workspaces independently of each other.



You can add notes to folders that are relevant to their content. A customer name, telephone number, date of birth, project ID, e-mail address are typical examples.

When scanning or using DesktopDelivery, this information can be automatically added to all PDF files entering this folder, so it is easier to search for them with the PaperPort All-in-One Search or other search utilities.

Folder Notes are added only if you checkmark **Automatically apply Folder Notes** in the Output panel of the Scan Settings dialog box or (in PaperPort Professional for DesktopDelivery) in the Folder Properties dialog box.

In PaperPort Professional, you can quickly import a set of folders plus any content by listing them in a plain text file with precisely this structure:

```
*** PaperPort ***
Foldername1
Foldername2
Foldername2/subfoldername2a
Foldername2/subfoldername2b
Foldername3
...etc.
```

Note how a top-level folder name must be listed in a separate line, with each of the desired sub-folders in a separate line.

Right-click in the Folders pane and choose **Import Folder Structure** to select the text file.



Add search criteria to items

You can assign item properties to PaperPort Image items and PDF files, and then use the properties as search criteria to find items in PaperPort.



PaperPort also allows you to assign the same keywords to multiple items at the same time, providing a powerful tool for organizing and locating similar documents and images.

Select multiple items on the PaperPort desktop, then choose **Properties** from the shortcut menu; words entered under **Subject**, **Author** and **Keywords** will be applied to all selected items.

Another way to assign the same item properties to all PDF files arriving in a folder of your choice through scanning or DesktopDelivery is to use Folder Notes. Enter words under **Subject**, **Author** and **Keywords**. These words are applied only if you checkmark **Automatically apply Folder Notes** in the Output panel of the Scan Settings dialog box or (in PaperPort Professional) in the Folder Properties dialog box for DesktopDelivery.



Finding Items

PaperPort provides features to help you find your PaperPort items. You can quickly find an item by visually browsing through thumbnails on your PaperPort desktop.

When you have many folders and items, PaperPort provides more powerful capabilities with All-in-One Search. This provides many options for specifying where and what to look for when finding an item, including indexed text content. This information is referred to as search criteria.

You can look for items by:

- Item properties (File search)
- Text content (Index search)

Find items by their properties

You can search for any type of item by its item name.

You can also search for PDF and PaperPort Image (.max) files by item properties, such as keywords and subject information.

When you search by item properties, turn off the **Use All-in-One Search index** checkmark, then specify criteria as follows:

- Name – item name (not necessarily that of the file).
- Author – as defined under Item properties.
- Keywords – as defined under Item properties.
- Comments – as defined under Subject under Item Properties.
- Annotations – Notes or text labels added to PDF files.
- URL – The link texts of captured web pages.



The Author, Keywords, Comments and URL are available for PDF or MAX files only. PaperPort 14 does not let you add metadata to MAX files; only metadata placed in an earlier version is available.

Find words in an item

To search for words within an item, you need to add the item to the All-in-One Search index and select **Use All-in-One index**. When you search using the index, you can find items that have been indexed by their properties, or text content, or both.

Specify search limits:

- all files in current folder but not its sub-folders
- current folder plus sub-folders
- all PaperPort folders and sub-folders.

Define search precision:

- Exact match finds words and common endings: search *look* finds *looks*, *looked*, etc.
- Approximate match finds as above and more: search *look* might find *lock* or *luck*.

When the search is complete, results are displayed – each as one row of a table. Select one and click the **View Text** button to see your search phrase occurrences in their context. Click the **Copy Text** button to extract text from the file and place it onto the Clipboard. Right-click a result file and choose **Open** to launch the document in its associated application. **Open Containing Folder** switches to the file's folder with the file selected.

To filter search results using file information, turn on the relevant checkboxes under **Name**, **author**, **keywords** and specify search text here as well.

Add items to the All-in-One Search index

The All-in-One Search index uses PaperPort's OCR software to extract and copy textual content from your items, and creates a database of the words or phrases in those items, much like the index of a book. Item properties, such as name and author, are also added to the index. Although creating an index is time consuming, searching for items in the index may be much faster than searching file by file.

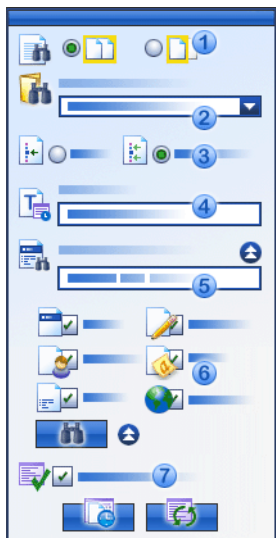
Using PaperPort Options available from the PaperPort button, you can specify whether you want All-in-One Search to run automatically each time you add a new item or modify an existing item. You can also set how long PaperPort should wait before starting the update process.

If you prefer, you can manually update the All-in-One Search index for all items, a single item, or all items in one or more folders. It is good practice to update the All-in-One Search index on a regular basis to shorten the length of time required to complete the process.



Use the Index Manager in PaperPort Professional to create and schedule indexing tasks on a regular basis. For quick access to your regular indexing processes, launch the Index Manager directly from the All-in-One Search pane.

Use the All-in-One Search pane



Use the All-in-One Search pane to enter search criteria and select options for finding your PaperPort items.

You can refine your search criteria by specifying the scope of the search in the **Find** box (1), defining where to look for the item or items in the **Look in** box (2) and choosing between **Exact match** and **Approximate** (3).

A file search is based on item properties only. You enter the item properties in the **Name, author, keywords** box (5).

An index search references PaperPort's All-in-One Search index to find item properties or actual text contained within an item. You enter the item properties in the **Name, author, keywords** box and the text content in the **Containing indexed text** box (4).

To do an index search without a file search, enter a string in the **Containing indexed text** edit box and clear all six file search checkmarks.

To do a file search without an index search, turn off the **Utilize All-in-One index** checkmark (7) and enter a string in the **Name, author, keywords** edit box, select as many of the six **file search checkmarks** (6) as desired.

To do a file and index search on a single search string, turn on **Use All-in-One index**, enter the string in the **Containing indexed text** edit box, make sure the **Name, author, keywords** edit box is empty and turn on as many file search checkmarks as desired. The search returns a list of all items that match the search string, either in file contents or file information.

To do a combined file and index search, turn on **Use All-in-One index**, enter a string in the **Containing indexed text** edit box, enter a string (same or different) in the **Name, author, keywords** edit box and turn on as many file search checkmarks as desired. The search returns a list of all items that contain the specified string or strings in **both** the file contents and the file information. In other words, you are likely to find few occurrences.



Use PDF Searchable Image

In addition to using PaperPort's proprietary search and indexing capabilities, you can also create **PDF Searchable Image** files that can be indexed and searched outside of PaperPort. PDF Searchable is a flavor of PDF; it contains a bitmapped image of a document or graphic with textual content stored as hidden text. This format maintains an identical appearance to the original document and enables other programs, such as Nuance PDF Converter Professional, Windows Desktop Search or Google to search the contents of the file.

You can create files in **PDF Searchable Image** format as follows:

- **Open** an item and choose **Save As** from its shortcut menu. Choose **PDF Searchable Image** as its file type.
- **Scan** an item using the profile **Color Searchable PDF document**.
- **Import** an image-only PDF into PDF Viewer Plus or PDF Converter Professional. It may offer to make a searchable copy; if not select **Make Searchable PDF** from the Tools menu.
- **Print** an image to the PaperPort desktop. By default it becomes an Image PDF. Go to **Desktop**, then **Options** and **Item** to specify **Searchable PDF** as your preference.



Schedule Indexing Tasks



The Index Manager is a PaperPort Professional application designed to create, modify and schedule indexing tasks for a given local or network folder. Indexed files can afterwards be searched with the All-in-One Search.

For new tasks you can set which folder to browse (local or network) with subfolders included or excluded, set timing and recurrence (duration, pattern and range), activate and deactivate a task, pause its completion, or skip a task occurrence. In the program settings dialog box, you can specify how and when the Index Manager should stop.

Sharing Files

PaperPort provides many tools to make it easy for you to share files, images, and documents with friends, colleagues, and business associates. These tools are built into the program and are readily available on different ribbons for quick access whenever you need them.

To help you share your items with others, PaperPort makes it easy to:



E-mail items to others, simply by dragging the items to your favorite e-mail program on the PaperPort Send To bar.



Scan or convert items to the PDF format, the ever-popular file-sharing format considered by many as the industry standard for document distribution.



Access shared folders located on your local or wide area network, by adding the folders to your PaperPort Folder pane.



Access Sharing and Security settings directly from the folder shortcut menu.



Access a number of cloud services including Microsoft SkyDrive, GoogleDocs, Box, FTP sites, and many more.



With PaperPort, it is simple to set up a shared folder on a server, web storage sites, or a PC that can act as a central repository for all important office documents. Each PaperPort client can connect to that folder and use PaperPort's document management

features and paper handling tools to find and use documents instantly.

In addition, you can convert items to popular output formats for shared use in numerous other programs. To obtain a list of all supported program links, visit PaperPort at the Nuance web site at <http://www.nuance.com>.

Connecting to the Cloud

PaperPort 14 introduces support for Cloud computing – accessing and working with web-based storage sites for programs, documents and data.



Nuance Cloud Connector

This is a self-standing program delivered with all variants of PaperPort, whose installation is optional. When installed, it can be started from the Nuance Cloud Connector group in the Windows Start menu. It provides access to other popular storage sites in the Cloud, including Microsoft SkyDrive, GoogleDocs, Box, multiple FTP sites, and many more. Its interface lets you establish connections from your file system to and from chosen Cloud sites; it also manages passwords and log-in data.



Evernote Connector

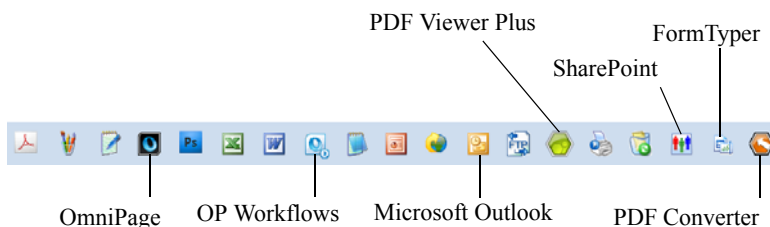
This is a new connector inside PaperPort 14, appearing as an icon on the Send To bar. This allows files to be dragged onto the icon so their copies are transferred to the Evernote storage site. Send To options can be used to specify access data.

Sending Items to Other Programs

Drag and drop functionality makes opening your files in your favorite programs a snap. Simply choose the file you want and drop it onto the program icon on the Send To bar at the bottom of the PaperPort desktop.

Common office tasks like e-mailing and faxing are now faster than ever. The Send To bar makes using scanned documents in other applications easier by automatically translating the document into a form that the receiving application can understand.

For example, you can drop a scanned image of a letter onto the Microsoft Word link on the PaperPort Send To bar, and PaperPort will recognize that the application you are attempting to open needs a text file rather than an image file. PaperPort will run OCR for you, and send editable text to Word rather than a static image file.




PaperPort supports a wide variety of programs including word processing, spreadsheet, fax, Internet e-mail, graphics, optical character recognition (OCR), and online services programs. The program link on the Send To bar does any necessary conversion and may provide options for sending the item.



Use OmniPage with PaperPort

If PaperPort exists on a computer with OmniPage, its OCR services become available and amplify the power of PaperPort. You can choose an OCR program by right-clicking on a text application's PaperPort link, selecting **Send To Options** and then selecting **OmniPage** as the OCR package, instead of the always available PaperPort OCR.

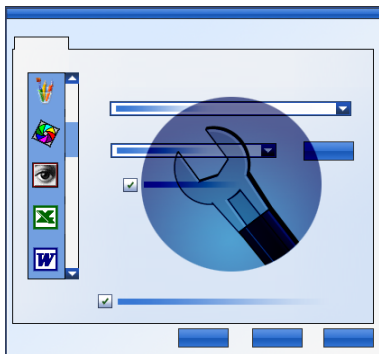
With OmniPage you can:

- Instantly convert paper into usable Microsoft Office documents.
- Turn PDF files into editable documents while retaining their layout.
- Automatically process images from network MFPs and scanners.
- Scan and convert documents into XML, PDF, TIFF and more.
- Share documents using e-mail, web, Cloud Connector, XML and e-books.
- Use **OmniPage Workflows**  for instant but effective control over document conversions.

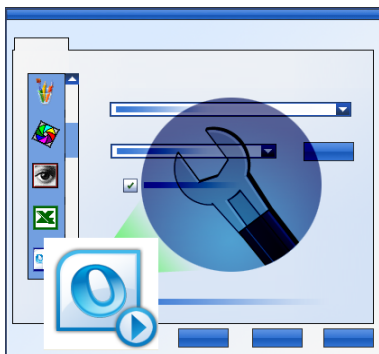
Customize the Send To bar

You can change the way program icons appear on the Send To bar in a number of ways. Specifically, you can add programs, and remove or rearrange program icons. Refer to the PaperPort Help for details.

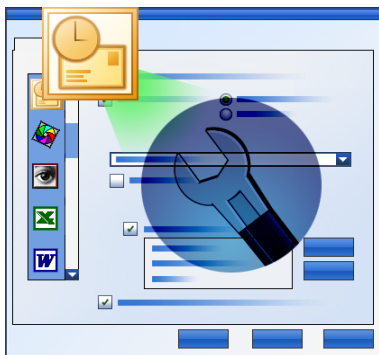
Adjust Send To options



You can tune Send To options to specify how you want to use a certain program on the Send To bar. For example, you can specify the file format in which PaperPort will save an item.



If you have the professional version of OmniPage 16 or above on your system, use the Send To options for the OmniPage Workflows link to choose a workflow.



To e-mail an item, simply drag and drop the item to your e-mail program on the Send To bar. Use the e-mail link options to specify the file format of the attachments and other options.

Converting Items

Using PaperPort, you can convert scanned documents and text items to image formats, and convert images back to text.

Convert items to image formats

You can convert scanned documents and text items to image formats.

The **Save As** command allows you to save image items to any of a variety of standard image formats including PDF, JPEG, and TIFF.

The **Duplicate Item** command makes a copy of the item, conserving its original file type.

The **Duplicate as PDF Item** command allows you to convert text items to PDF Image items.

In PaperPort Professional, you can also convert text items such as Word documents, to PDF Formatted Text & Graphics format using PDF Create.

By selecting more than one item, you can convert multiple items to a new format at the same time. Refer to Help for details.

Stacking documents

You can assemble a set of PDF files by **stacking** them into a single PDF.

You can unstack the current page or all pages from a multi-page PDF file.

When all pages are unstacked, the result is a set of single-page PDF files, uniquely identified by a set of numerical suffixes. When stacking and unstacking, the original PDF files or pages do not remain. To stack files, use drag-and-drop or select the desired files, right click and choose **Stack**. Similarly, use a shortcut menu to unstack a PDF file.

Combining documents

You can assemble documents by **combining** them. The files to be combined need to be in a single folder and selected in the order you want them in the stack. Click the arrow next to **Combine Items** in the Stack group of the Item ribbon, and choose one of the combinations:

- **Combine into PDF Stack:** Each original page becomes one PDF page with no resizing.
- **Combine into Multi-item PDF Pages, Resize to fit:** This resizes the contributing items and always places four original pages onto a single PDF page.
- **Combine into Multi-item PDF Pages, Maintain original sizes:** This places as many original pages onto each PDF page as it can.
- **Combine into Thumbnail PDF Page:** This creates thumbnails of all item pages and fits as many as possible on a PDF page.



The original items remain in their original file types.

Combining usually takes more time than stacking because of PDF generation.

PaperPort Professional can additionally combine text items. To convert a text item, the application that created it must be available on your system.

Convert images to text

You can convert scanned documents to text by a simple drag-and-drop of the thumbnail to your word processor program. PaperPort automatically processes your scanned document using PaperPort's OCR software, launches your word processing program, and loads the scanned text into a document ready for editing. PaperPort also allows you to copy text from part of an image item for use in a text editing, word processing, or spreadsheet program. The OCR software processes the text and copies it to the Windows Clipboard. Open the program in which you want to insert the text, and use **Paste** to paste the text in a file.



Filling Forms

Active PDF forms can be filled using your PDF product. Choose the **Hand** tool and step through the form fields using **Tab** or **arrow keys**, making choices and entering texts. Help and the How-to-Guides list all the possible form control types.

FormTyper is a PaperPort program that enables you to fill in static forms, such as insurance forms, registration cards, and medical forms, that you scan to the PaperPort desktop.

You simply drag a form from the PaperPort desktop to the FormTyper program on the Send To bar. The form is converted to PDF if necessary and opened in your Nuance PDF product. FormTyper automatically analyzes the form, recognizes the blank areas in which data can be entered, and creates blank fields for the data. FormTyper can detect edit boxes and checkmarks.

Now, you can quickly type and tab to each field. You can also quickly reposition edit box or checkmark fields, insert new fields, and remove fields as necessary. After you enter data and complete the form, save the form to the PaperPort desktop so that you can print or e-mail the form in its entirety with its completed data.

If you have a pre-printed form, choose **Form Fields Only** in the Print dialog box to print your responses directly onto the form.



PDF File Support

PDF Flavors

Portable Document Format (PDF) files are often classified into three different types, commonly called flavors:

- PDF Image
- PDF Searchable Image
- PDF Formatted Text & Graphics (PDF Normal)

Opening PDF files

PaperPort can open and display PDF files of all three flavors. PDF files by default open in PDF Viewer Plus or (if available) in PDF Converter Professional, versions 6 or 7.

The following further options are available in the Desktop panel of the Options dialog box:

- Image View (to apply image enhancement tools in a PaperPort window)

- ImageViewer (to apply these SET tools in a separate program window)
- Program associated with file type (your system application for PDF files)

You need to choose the last option if you use version 5 or earlier of PDF Converter Professional as your PDF program.

Protected files can be accessed by giving the correct password. Security limitations are respected and can be changed if you can provide the Permissions password.

PDF page operations

In PaperPort you can insert or append pages from one PDF file to another and also stack a set of PDF files into a single one. With pages of different flavors, the program determines a single flavor for the resulting file. You can unstack one or all pages from a multi-page PDF file to get one PDF per page.

Combining items into a PDF file

You can combine a wide range of image items into a single target PDF. All combined items remain in their original locations and file types. In PaperPort Professional text items can also be combined.

Annotating PDF files

You can add notes, highlights and graphic items like arrows to PDF pages of any flavor as annotations. These do not become part of the real PDF page, but exist on separate layers so they can be viewed, moved, changed or deleted in PaperPort or other PDF viewing and editing programs. Annotation can be done in ImageViewer or your PDF product.

Modifying PDF files

Use SET tools to improve the appearance of PDF pages or prepare them for more successful text recognition (OCR). See page 30 and the Help topic: *About enhancing pages and images*. To modify the real text content in a PDF file, or change its color or attributes, you need a PDF editor such as Nuance PDF Converter Professional.

Extracting text from PDF files

The Copy Text command finds text in PDF files and places it onto the Clipboard as plain text, running OCR if necessary. The command View Text does the same, but displays the text in a PaperPort window. You can choose to have these texts stored or not; if not it is regenerated each time the command is used. Send PDF files to word processor programs on the Send To bar. This delivers editable text with a defined level of formatting, using OCR if necessary.

See the Help topics: *To convert scanned documents to text* and *Output options* for the target program.

Adding document information to PDF files for searching

You can define an item name, author, subject and keywords to a PDF file and also assign page names to each page to help in searching. See the Help topic: *Assigning properties to PaperPort Image and PDF files* and *Item properties*.

The All-in-One search finds words in this document information for one or more PDF files. You can search through document information only, through text content only, or both, with different search strings for each search type. Indexing via the Index Manager makes full text searches much faster.

Saving PDF files to other file types

You can save PDF files to a range of image file types and to XPS files. See Help: *Saving to other formats*. A multi-page PDF results in a single file when a multi-page file type is selected, otherwise each PDF page becomes a separate file.

Adding PDF files to Windows Desktop Search

Go to **Desktop**, then **Options** and **Advanced** to enable or disable PaperPort as the agent for handling PDF files in Windows Desktop Search.

See the Help topics: *About PDF files* and *PDF file support*.

Creating PDF Documents

Create PDF Image files from other applications

In **Desktop**, then **Options** and **Items** choose between **PDF Image** and **PDF Searchable Image**. Then open a source file in a suitable application and choose **Print**, typically from the File menu. Choose **PaperPort Image Printer** and make print settings, e.g. black-and-white versus color conversion. See the Help topic: *About the PaperPort print driver* and *Printing to PDF from other applications*.

Create PDF Searchable files from scanning

Open a scanning profile and set the PDF file type in the Output panel or choose the supplied profile **Color Searchable PDF Document**. See the Help topic: *Modifying Scan Profiles*. Use the profile to generate PDF files.

Create a PDF from an existing PDF, XPS or image item

Right-click on a PDF file and choose **Duplicate Item**, **Duplicate Current Page** or **Save As**. The flavor of a source PDF is retained for the copy. Right-click on an image item and choose **Duplicate as PDF** or **Save As** and choose **PDF** as file type. When you double-click an XPS file so that it opens in PDF Viewer Plus, a copy is automatically created as a PDF file, ready to be modified and saved.

Creating PDF Documents with PDF Create

Nuance PDF Create lets you create PDF files from one or more source documents. The PDF files will be viewable, printable, searchable and editable.

How to Start PDF Creation

You can start PDF creation from different locations:

- from the Start menu through the Create Assistant
- from Windows Explorer or from your desktop using a shortcut menu

- from Microsoft Word, Excel, PowerPoint, Outlook or Internet Explorer using a toolbar or the PDF Create menu items or the Nuance PDF ribbon.

The Help topic: *About creating PDF files* details all the possible starting points for PDF creation and the available choices.

How to Get Help for PDF Create

Nuance PDF Create has a comprehensive HTML Help system. Access it through the Help system in PDF Viewer Plus or PDF Converter Professional or through the PDF Create menu in Microsoft Word, Excel or PowerPoint. Press **F1** to open Help at the topic describing the currently open panel. You can create one or more of these PDF flavors, depending upon your version of PaperPort software. Refer to the PaperPort Help for additional details. This table lists which features are available for creating each type of PDF in PaperPort 14 and PaperPort Professional 14:

Format	PaperPort 14	PaperPort Professional 14
PDF Image	Scan or Get Photo Print to PaperPort Save As (Web Capture)	Scan or Get Photo Print to PaperPort Save As (Web Capture) Duplicate Item
PDF Searchable Image	Scan or Get Photo Print to PaperPort Save As (Web Capture)	Scan or Get Photo Print to PaperPort Save As (Web Capture) Duplicate Item
PDF Formatted Text & Graphics (Normal PDF)	Scan or Get Photo	Scan or Get Photo Print to PaperPort Duplicate Item Duplicate as PDF

Web Capture must be run outside PaperPort. See page 28.

Duplicate item transmits the PDF flavor of the original to the copy.

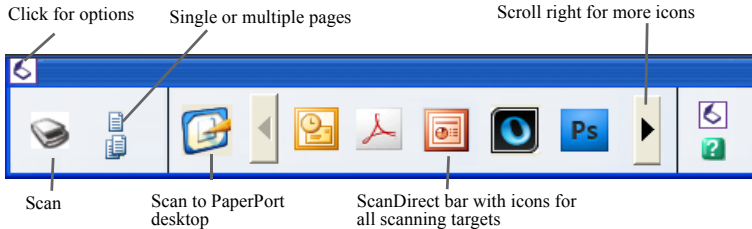
Duplicate as PDF accepts non-PDF files as input.



Using ScanDirect

ScanDirect is a PaperPort program that enables you to scan items and send them directly to PaperPort or other programs on your computer without first running PaperPort.

ScanDirect runs as a separate program from the Windows **Start Menu** and displays the ScanDirect bar.



Using ScanDirect, you can scan an item and immediately send it to either:

- A program on the ScanDirect Send To bar – Icons on the ScanDirect bar represent the programs that are linked to PaperPort and to ScanDirect. To scan and then send an item to a certain program, click the program icon, and then scan the item. ScanDirect will automatically start that program when the scan is complete.
- The PaperPort desktop – To scan and then work with the item in PaperPort, click the PaperPort icon, and then scan the item. When the scan is complete, PaperPort starts and displays the item in PaperPort. You can then use all of PaperPort's features on the item.

When ScanDirect is used to scan to other programs it always works through the scanner's own user interface; the scan profiles in PaperPort are not used. When ScanDirect is used to scan items to the PaperPort desktop, the output is determined by the output setting for the previous scan: if it created an image item, the current scan will also do this, and if it created a text-type document (such as DOC, XLS, WPD, TXT or CSV) the current scan will create a PDF Image, which you can make searchable, as already described. In PaperPort Professional, you can scan items directly to Microsoft SharePoint.

Uninstalling PaperPort

For a full uninstallation, all PaperPort components should be removed one after the other. The components are as follows: Nuance Cloud Connector (optional component), Nuance PDF Create (only in PaperPort Professional), Nuance PDF Viewer Plus, PaperPort Image Printer and Nuance PaperPort 14.

Removing only one or more of the following components: Image Printer, PDF Viewer Plus or PDF Create will cause PaperPort to function incorrectly.

For example (and not limited to the following functionalities): PDF Viewer affects FormTyper, PDF Create affects the save and combine to PDF functionality in PaperPort.

To uninstall PaperPort and its key components:

1. In Windows XP, go to **Control Panel**, then **Add or Remove Programs** (in Windows Vista, Windows 7 and Windows 8, go to **Control Panel**, then **Programs and Features**).
2. Select **Nuance PaperPort 14**.
3. Click **Remove** to uninstall the program.
4. Repeat this for the remaining components.
5. A computer restart is needed to complete the removal.

A deactivation step is performed at the start of uninstallation, allowing you to reinstall the program later without reactivation problems. Deactivation and reactivation require web access.

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